

# Contextual information

## to interpret market developments of the EU fishery and aquaculture sector

May 2021

24/06/2021

This document provides an overview of what happened in the European sea basins in May 2021, highlighting the main factors that might have had an impact on the fisheries and aquaculture sector. It is a support document to better interpret and contextualise the variations described in the [EUMOFA's monitoring report](#). Indeed, looking at the market from different points of view might help better understand its variations. Currently, two events are having an impact on the fishery and aquaculture sector: the COVID-19 pandemic and the withdrawal of the United Kingdom from the European Union. While establishing whether the trends described in the report are due to COVID-19 and/or Brexit cannot be done with certainty, it is possible to exclude their involvement if other explanations can be provided.

Geographic coverage: Baltic Sea, Bay of Biscay and Iberian coast, Celtic Sea, Mediterranean Sea, North Sea, and Black Sea.

## Content

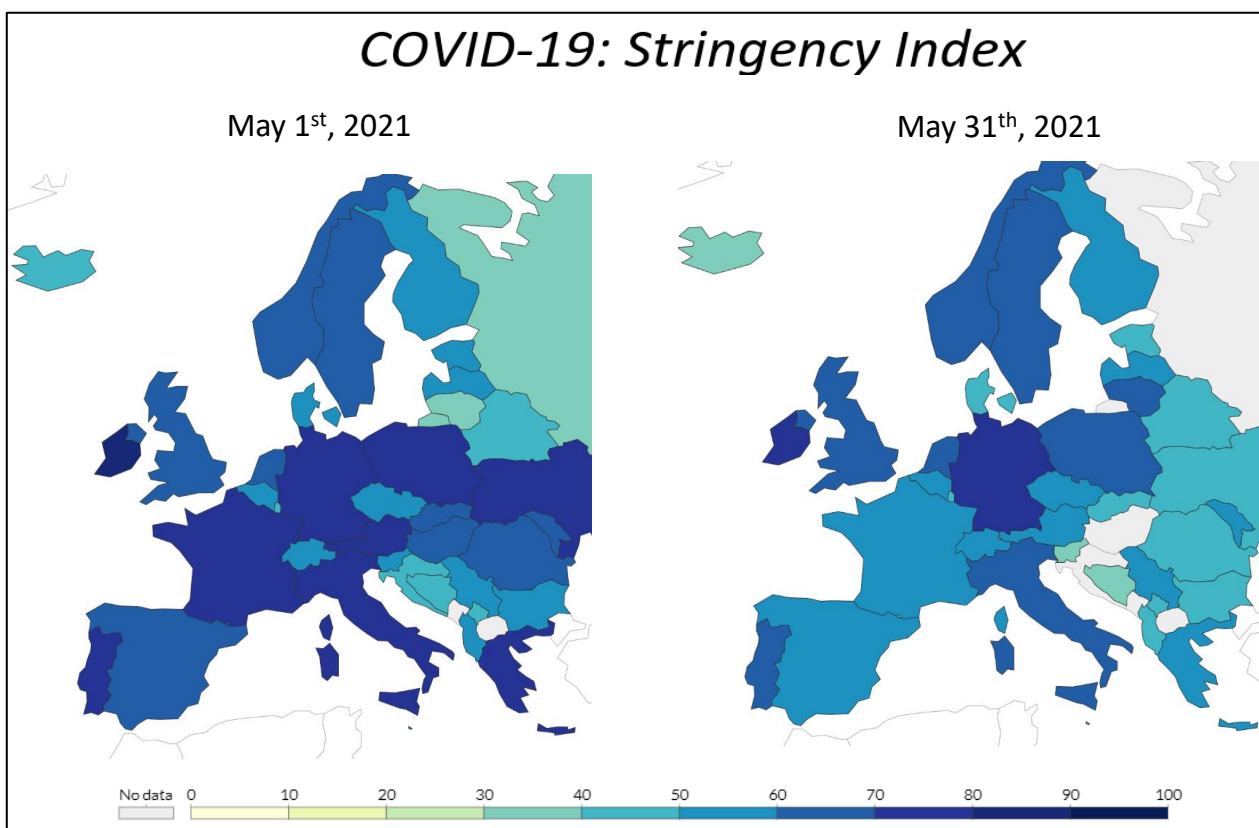
Overview on COVID-19 response measures taken .....	1
Weather .....	2
Fishing or market closures and openings .....	3
Total Allowable Catches uptake.....	4
Other highlights .....	5
Marine gasoil prices in May 2021.....	8
Annex.....	9



## Overview on COVID-19 response measures taken

A quick overview of the measures undertaken by each country is provided through the “COVID-19 Stringency Index” developed by the University of Oxford’s Blavatnik School of Government. The Stringency Index measures the rigidity of measures adopted by governments to face the pandemic spread. This index is based on nine indicators including the closure of schools, workplaces, public transport, the ban on movement, gathering and all relevant actions that countries have been adopting since the start of the pandemic. The following maps show the situation at the beginning and at the end of May 2021.

Figure 1 - Response measures undertaken by countries in the European sea basins



Source: Stringency Index. Data published by: Thomas Hale, Noam Angrist, Rafael Goldszmidt, Beatriz Kira, Anna Petherick, Toby Phillips, Samuel Webster, Emily Cameron-Blake, Laura Hallas, Saptarshi Majumdar, and Helen Tatlow. (2021). “A global panel database of pandemic policies (Oxford COVID-19 Government Response Tracker).” *Nature Human Behaviour*. <https://doi.org/10.1038/s41562-021-01079-8>.<sup>1</sup>

According to the Stringency Index, most of the EU Member States have lightened the measures adopted to face the COVID-19 pandemic spread. Measures remained stable in some countries of Western and Central Europe (Belgium, Germany, Luxembourg, Switzerland and Czech Republic) and of Northern Europe (Sweden, Finland and Latvia).

<sup>1</sup> Map available at: <https://www.bsg.ox.ac.uk/research/research-projects/oxford-covid-19-government-response-tracker>



## Weather

The weather conditions in May 2021 appeared to be mainly similar to those recorded in the same month of the previous year in the Baltic Sea, Bay of Biscay and Iberian coast, and the Mediterranean Sea. Thus, as for the comparison, they do not seem to have had a major impact on the fishery activities. However, the adverse weather conditions in May 2021, also compared to the same month in 2020, affected the fishery activities in the Celtic and North Sea.

Figure 2 Weather conditions in May 2021 compared to May 2020

Sea basin	Impact: low, medium, high	Comments
Baltic Sea		The weather conditions were appropriate for fishing and similar to those recorded in the same period of 2020.
Bay of Biscay and Iberian coast		The weather was characterized by mutable conditions, similar to those recorded in the past year.
Celtic Sea		The weather was worse compared to last year. It was stormy (beginning of the month) and highly windy (around the third week of the month).
Mediterranean Sea		The weather was similar compared to the same month of 2020.
North Sea		The weather was worse compared to the last year. Particularly adverse weather conditions were registered on the French coast.



## Fishing or market closures and openings

---

### Baltic Sea

“Council Regulation (EU) No 2020/1579 of 29 October 2020 fixing for 2021 the fishing opportunities for certain fish stocks and groups of fish stocks applicable in the Baltic Sea and amending Regulation (EU) 2020/123 as regards certain fishing opportunities in other waters” provides that “It shall be prohibited to fish with any type of fishing gear in subdivisions 25 and 26 from 1 May to 31 August (...), and in subdivision 24 from 15 May to 15 August.”<sup>2</sup> An exemption from the prohibition applies to EU fishing vessels of less than 12 meters in length that fish in waters less depth than 20 meters.

### Black Sea

Romania confirmed the indefinitely ban on fishing and marketing of sturgeons, one of the most endangered fish worldwide. In the EU, the North-Western Black Sea is one of the few regions where naturally-reproducing sturgeon populations can still be found.<sup>3</sup>

### Celtic Sea

No seasonal closures or closures due to the restrictions caused by COVID-19 were registered in the sea basin.

### North Sea

The EU and the United Kingdom concluded the negotiations on an agreement in principle setting out catch limits for jointly managed fish stocks for 2021. The agreement establishes the total allowable catches for 75 shared fish stocks for 2021, as well as for some deep-sea stocks for 2021 and 2022. It provides also clarity on access limits for non-quota species<sup>4</sup>.

---

<sup>2</sup> Council Regulation (EU) 2020/1579 of 29 October 2020: [https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv:OJ.L\\_.2020.362.01.0003.01.ENG](https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv:OJ.L_.2020.362.01.0003.01.ENG)

<sup>3</sup> See the website of the Life project “Sustainable protection of lower Danube sturgeons by preventing and counteracting poaching and illegal wildlife trade” at <https://danube-sturgeons.org/the-project/> and <https://www.agerpres.ro/agerpres/2021/03/05/ministrul-mediului-pescuitul-sturionilor-interzis-pe-o-perioada-nedeterminata--672903>

<sup>4</sup> More information on the agreement is available on Europa: [https://ec.europa.eu/commission/presscorner/detail/en/statement\\_21\\_2828](https://ec.europa.eu/commission/presscorner/detail/en/statement_21_2828)

## Total Allowable Catches uptake

The following table reports the Total Allowable Catches (TAC) uptake per sea basin and for selected species consumed and/or utilized up to May 2021.<sup>5</sup>

Figure 3 TAC uptake

Sea basin	Species	TAC - Adapted quotas (Kg)	Total catches up to May 2021 (Kg)	Quota consumed up to May 2021
<i>Baltic sea</i>	Cod	6.550	1.442,73	22%
	European plaice	21.067	2.642,79	13%
	Herring	231.853	140.396,48	61%
	Norway lobster	12.382,44	2.311,97	19%
<i>Bay of biscay and Iberian coast</i>	Common sole	3.399	1.743,97	51%
	Hake	33.573	14.260,89	42%
	Norway lobster	4.360,40	1.551,54	36%
<i>Black sea</i>	Sprat (=Brisling)	11.475	1.223,38	11%
	Turbot	150	70,87	47%
<i>Celtic sea</i>	Common sole	3.741,14	1.322	35%
	Haddock	13.346	3.352,94	25%
	Monk	24.279,40	10.514,66	43%
	Norway lobster	13.684	3.187,68	23%
<i>Mediterranean sea</i>	Bluefin tuna	22.103,27	9.975,42	45%
	Swordfish	6.560,43	376,90	6%
<i>North sea</i>	Cod	13.288	2.261,72	17%
	Common sole	11.391	3.557,44	31%
	European plaice	100.231	10.142,94	10%
	Norway lobster	6.669	610,37	9%

<sup>5</sup> Data provided by FIDES (Fisheries Data Exchange System).



## Other highlights

## Bay of Biscay and Iberian coast

According to the weekly first sales data available<sup>6</sup>, the top species in this sea basin in terms of value in May 2021, were the following.

Figure 4 Top species in terms of value in selected locations in the Bay of Biscay and Iberian coast in May 2021 (weeks 18-21)







Weekly first sales		Time frame: W18-21			
Volume (KG)	2019	2020	2021	Trend	
Hake	2.536.155,50	2.681.079,19	2.182.573,85		
Lobster, Norway	306.497,30	257.932,70	359.174,20		
Monk	998.762,80	1.093.071,01	724.879,40		
Octopus	428.564,91	458.574,30	342.811,93		
Sardine	42.655,22	209.710,80	1.737.331,36		
Value (EUR)	2019	2020	2021	Trend	
Hake	7.230.970,12	4.648.170,51	5.095.481,05		
Lobster, Norway	2.103.472,65	1.998.690,13	2.668.885,01		
Monk	3.323.421,98	2.618.329,37	2.227.916,70		
Octopus	1.840.334,82	1.772.489,17	1.785.870,18		
Sardine	123.369,17	465.552,31	1.978.041,41		
Price (EUR/kg)	2019	2020	2021	Trend	
Hake	2,85	1,73	2,33		
Lobster, Norway	6,86	7,75	7,43		
Monk	3,33	2,40	3,07		
Octopus	4,29	3,87	5,21		
Sardine	2,89	2,22	1,14		

<sup>6</sup> Available weekly first sales data are only monitored for a selection of specific products of different species in specific places of sale in France, Portugal and Spain. Thus, the figures reported are not to be intended as total first sales of these species in the sea basin. To see which products in which locations the data in Figure 3 refer to, please see Annex below in this document.

## Black sea

The following table reports monthly first sales data for May in Bulgaria<sup>7</sup>. It appears that volumes of clam and sprat in 2021 recovered from the drop reported in the same month of 2020.

Figure 5 Top species in terms of value for the month of May

Monthly first sales		Time frame: May			
Volume (KG)	2019	2020	2021		Trend
Clam	21.839,00	1.760,00	76.563,00		
Sprat (=Brisling)	341.458,70	85.664,00	325.698,80		
Value (EUR)	2019	2020	2021		Trend
Clam	63.062,79	6.299,21	176.030,37		
Sprat (=Brisling)	107.759,33	15.394,52	119.690,51		
Price (EUR/kg)	2019	2020	2021		Trend
Clam	2,89	3,58	2,30		
Sprat (=Brisling)	0,32	0,18	0,37		

Further to the publication of the annual scientific advice for 2022 EU fishing limits for the Baltic Sea by the International Council for the Exploration of the Sea (ICES), a group of non-governmental organisations calls on the Commission to follow the scientific advice and implement radical measures. They include to propose Baltic fishing limits for 2022 that do not exceed scientific advice, as well as to implement an ecosystem-based approach to fisheries management in line with the objectives of the Common Fisheries Policy, and consider setting Baltic TACs at lower levels<sup>8</sup>.

<sup>7</sup> The most recent monthly first sales data for April 2021 are available via the EUMOFA website and can be accessed [here](#).

<sup>8</sup> For more information, visit: [https://ccb.se/2021/05/eu-must-respond-to-baltic-sea-ecosystem-and-fisheries-crash-with-urgent-radical-measures/?utm\\_source=rss&utm\\_medium=rss&utm\\_campaign=eu-must-respond-to-baltic-sea-ecosystem-and-fisheries-crash-with-urgent-radical-measures](https://ccb.se/2021/05/eu-must-respond-to-baltic-sea-ecosystem-and-fisheries-crash-with-urgent-radical-measures/?utm_source=rss&utm_medium=rss&utm_campaign=eu-must-respond-to-baltic-sea-ecosystem-and-fisheries-crash-with-urgent-radical-measures)

## Mediterranean Sea

According to the weekly first sales data available<sup>9</sup>, the top species in this sea basin in terms of value in May 2021, were the following.

Figure 6 Top species in terms of value in selected locations in the Mediterranean Sea in May 2021 (weeks 18-21)

Weekly first sales		Time frame: W18-21			
Volume (KG)	2019	2020	2021	Trend	
Mackerel	116,10	1.260,60	1.073,70		
Sardine	139.750,00	34.341,81	27.567,31		
Swordfish	7.012,00	16.053,00	31.271,00		
Shrimp, miscellaneous	30.000,85	27.936,99	25.301,71		
Value (EUR)	2019	2020	2021	Trend	
Mackerel	446,74	5.421,52	7.466,30		
Sardine	52.247,81	37.709,26	25.082,25		
Swordfish	62.098,88	117.815,67	278.269,50		
Shrimp, miscellaneous	955.346,59	672.591,18	826.286,56		
Price (EUR)	2019	2020	2021	Trend	
Mackerel	3,85	4,30	6,95		
Sardine	0,37	1,10	0,91		
Swordfish	8,86	7,34	8,90		
Shrimp, miscellaneous	31,84	24,08	32,66		

The EU Commission approved EUR 500 million Greek support scheme under the State aid Temporary Framework<sup>10</sup> to support food service companies affected by the coronavirus outbreak. The scheme, co-financed by the European Regional Development Fund (ERDF), is also directed to operators active in the fishery and aquaculture sector.

In Italy, the Decree Law n. 73 of 25 May 2021 (Urgent measures related to the COVID-19 emergency, for businesses, work, young people, health and territorial services<sup>11</sup>), provided with a one-off allowance of EUR 950 in favor of self-employed professional fishers, including members of cooperatives.

<sup>9</sup> Available weekly first sales data are only monitored for a selection of specific products of different species in specific places of sale in France and Spain. Therefore, the figures reported are not to be intended as total first sales of these species in the sea basin. To see which products in which locations the data in Figure 4 refer to, please see Annex below in this document.

<sup>10</sup> For more details, please visit [https://ec.europa.eu/commission/presscorner/detail/en/IP\\_21\\_2444](https://ec.europa.eu/commission/presscorner/detail/en/IP_21_2444)

<sup>11</sup> This and more Italian support schemes are available at <https://temi.camera.it/leg18/temi/agricoltura-e-pesca-nel-decreto-legge-n-18-2020-sostegno-economico-emergenza-covid-19.html>



## North Sea

In the Greater North Sea<sup>12</sup>, at the end of April 2021, several demonstrations were organised by French fishermen to contest the slow issuing of licenses by the UK government (in order to be allowed to fish in the 6-12 UK nm zone<sup>13</sup>). At the beginning of May, protest by French fishers at Jersey's main port ended, following talks aimed at resolving the dispute.<sup>14</sup> As stated above, on 2 June, the EU and the United Kingdom concluded the negotiations on an agreement in principle for 2021 concerning fisheries in UK waters.

## Marine gasoil prices in May 2021

Price of gasoil<sup>15</sup> in the monitored sea basins showed increases between April and May 2021.

Figure 7 Marine gasoil prices

Sea basin	2021				April-May %
	March	April	May		
Baltic Sea	0,41 €	0,40 €	0,42 €	↑	5%
Bay of Biscay and Iberia	0,45 €	0,44 €	0,45 €	↑	4%
Celtic Sea	0,41 €	0,41 €	0,43 €	↑	5%
Mediterranean Sea	0,41 €	0,41 €	0,43 €	↑	6%
North Sea	0,39 €	0,39 €	0,41 €	↑	5%

<sup>12</sup> According to ICES, the Greater North Sea ecoregion includes the North Sea, English Channel, Skagerrak, and Kattegat. See details at: [https://www.ices.dk/sites/pub/Publication%20Reports/Advice/2018/2018/GreaterNorthSeaEcoregion\\_EcosystemOverview.pdf](https://www.ices.dk/sites/pub/Publication%20Reports/Advice/2018/2018/GreaterNorthSeaEcoregion_EcosystemOverview.pdf)

<sup>13</sup> “nm” stands for nautical miles.

<sup>14</sup> For more information, please visit <https://www.bbc.com/news/uk-57011376>

<sup>15</sup> Data collected from Mabux: Marine bunker exchange and aggregated on a monthly basis.

## Annex

## Bay of Biscay and Iberian coast

Products and locations of the main commercial species analysed for the Bay of Biscay and Iberian coast sea basin in Figure 4.

MCS: HAKE		
Product	Port	Year
Benguela hake	ES - Cadiz	2019-2020-2021
European hake, gutted, size 2	FR - Les Sables-d'Olonne	2019-2020-2021
	FR - Lorient	
European hake, whole, size 1	ES - Burela	2019-2020-2021
	ES - Cillero	
European hake, whole, size 2	ES - Burela	2019-2021
	PT - Peniche	
	PT - Sesimbra	
	PT - Matosinhos	2020
	PT - Olhão	
PT - Sesimbra		
European hake, whole, size 2	ES - Burela	2019-2021
	PT - Matosinhos	
	PT - Olhão	2020
European hake, whole, size 3	ES - Burela	2019-2020-2021
	PT - Matosinhos	
	PT - Olhão	
	PT - Peniche	
	PT - Portimao	
PT - Sesimbra		
European hake, whole, size 4	ES - Burela	2019-2021
	ES - Pasajes	

MCS: Lobster, Norway		
Product	Port	Year
Norway lobster, alive, size 4	FR - Concarneau	2019-2020-2021
	FR - Guilvinec	
	FR - Lorient	

MCS: Monk		
Product	Port	Year
Blackbellied angler, size 1	ES - A Coruña	2019-2020-2021
Blackbellied angler, size 2	ES - Vigo	
Monk, gutted, size 2	FR - Guilvinec	
Monk, gutted, size 2	FR - Lorient	

MCS: Octopus		
Product	Port	Year
Common octopus	ES - Isla Cristina	2019-2020-2021
	ES - Santa Eugenia Ribeira	2019-2020
Common octopus, whole	PT - Matosinhos	2019-2020-2021
	PT - Olhão	
	PT - Peniche	
	PT - Portimao	
	PT - Sesimbra	

MCS Sardine		
Product	Port	Year
European pilchard(=Sardine), whole	ES - Barbate de Franco	2019-2020-2021
	ES - Isla Cristina	
Sardine, whole, size 1	FR - Saint-Guénolé	2019
Sardine, whole, size 2	PT - Matosinhos	2021
	PT - Peniche	
	PT - Portimao	
	PT - Sesimbra	
Sardine, whole, size 3	PT - Matosinhos	2021
	PT - Olhão	
	PT - Sesimbra	

### Mediterranean Sea

Products and locations of the main commercial species analysed for the Mediterranean Sea in Figure 6.

MCS: Mackerel		
Product	Port	Year
Atlantic mackerel, whole, size 2	FR - Agde	2019-2020-2021

MCS: Sardine		
Product	Port	Year
Round sardinella	ES - Mazarrón	2019-2020-2021
	ES - San Pedro del Pinatar	

MCS: Shrimp, miscellaneous		
Product	Port	Year
Blue and red shrimp	ES - Blanes	2019-2020-2021
	ES - Palamós	
	ES - Palma de Mallorca	

MCS: Swordfish		
Product	Port	Year
Swordfish	ES - Roquetas de Mar	2019-2020-2021